# Email Merge in Google Sheets and Google Mail

This document will instruct you in how to send personalized emails to a large number of individuals by using information in a Google sheet.

Notes:
- This is only for email, not for a mail merge using intercampus or US Postal Service. You can continue to use Microsoft Word and Excel for that process.
- You can only send 2000 messages a day. If you need to do more than this you will have to split the job over multiple days or make arrangements with an outside vendor to send the mail for you
- The Google spreadsheet template described below has to be used, if you already have information in excel or a different Google Sheet you will need to copy that information into the template.
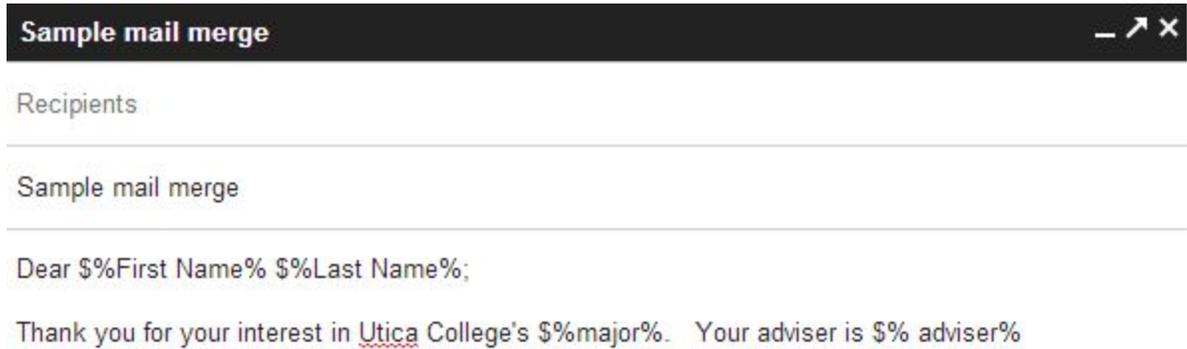
Instructions:

- Log into your Google Mail account.
- Now open a new tab and open the UC email merge template located at the link below.
  Template gallery: https://docs.google.com/spreadsheets/u/0/?tgif=d&ftv=1
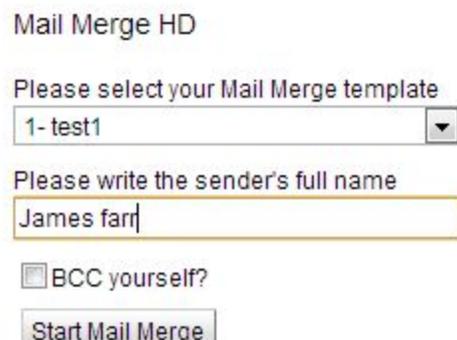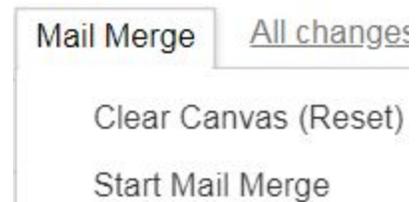

  UC eMail Merge Template
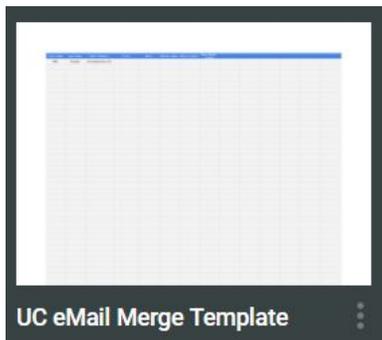
- This template is now open in Google Drive and this file exists in your account. You may want to rename it by clicking on the name "UC eMail Merge Template" at the top and typing something relevant for you, like "Newsletter Mail Merge Fall 2018".
- Delete the data from Row 2, leaving the header information such as First Name. This information is provided as an example of how the data should look.
- You can rename columns or add more if needed, but make sure to leave the Mail Merge Status column at the end and it should be blank right now.
- If you already have an Excel document or Google sheet that you want to get information from you can copy and paste that data into this template. Make sure the column names match what you are pasting in! You may want to copy and paste only a few columns (the ones you need) from a larger report to keep things simple. For example, If you don't need the email to say the person's mailing address then don't include that data.
- **YOU MUST include a column exactly named "Email Address".**

- Now that you have the data setup, it's time to write the email.
- On your Google mail account start writing a new email.
- Enter the subject and the content of the message.
- Where you want the data from your spreadsheet template to appear use a dollar sign and then the percent sign and the column name, and then another percent sign. Example: "Dear $%First Name% $%Last Name%." Example:

Sample mail merge — ↗ ✕

Recipients

Sample mail merge

Dear $%First Name% $%Last Name%;

Thank you for your interest in Utica College's $%major%.   Your adviser is $% adviser%

NOTE: Adding images to the email does not work when doing mail merges this way. See further instructions at the bottom for details on how to do this, but it can be complicated.

- With the email ready to go, Google will save it as a draft message. Go back to the eMail Merge google doc with your data in it.
- Make sure every row of your data includes an email address. If email addresses are missing it will cause an error later on.
- Click the Mail Merge menu at the top.

Mail Merge   All changes

- After clicking the Mail Merge button you will be asked to authorize the use of a script. We know this is safe so click Allow, then OK.

Clear Canvas (Reset)

- After this you will have to hit Mail Merge menu button again, then Start Mail Merge. This will prompt you to select an email message to merge with. Google saves last 10 messages from your Drafts in the drop down list. (If the draft email was old you may have to open it and make a change so Google saves it again the day of your mailing.) In the example below I am selecting 1- test1.

Start Mail Merge

- On the next line I typed the name I wished the email to appear from. You could enter your office name instead, but don't just use "Utica College", and make sure the email body states who to contact.

Mail Merge HD

Please select your Mail Merge template
1- test1 ▼

Please write the sender's full name
James farr

- If you want to get a copy of the message you are sending, check the box for BCC yourself.

☐ BCC yourself?

Start Mail Merge

- There is no going back, so make sure that your data and email content is correct before doing this. Click the Start Mail Merge button.
- While the merge is in process a box will appear in the lower right hand corner, showing the progress. When done it will also show how many messages you are still allowed to send (based on Google's limits and other emails you've sent recently). If you reach your maximum you have to wait until it resets (it's on a rolling 24 hours basis).
- Your template will now show "EMAIL_SENT" in the Mail Merge Status column. Skim that column to make sure everything went through. If the system came across a problem, like a missing email address, it'll stop in the middle. Fix the error and run the merge again. It will not re-email the people that it already successfully sent to.

First Name	Last Name	Email Address	Title	Major	Advisor Name	Advisor Email	Mail Merge Status
Help	Desk	jfarr@utica.edu	Help Desk	Public Relations	Sue Smith	sue@utica.edu	EMAIL_SENT
a	a	wrong@utica.edu	sf				EMAIL_SENT
c	c	infosec@utica.edu	sdfioj	ioj	oi		EMAIL_SENT

- Gmail does not verify your addresses. It assumes that if there is an email address that it was entered correctly. In the example below wrong@utica.edu was used. The message was sent to this person, but nobody will receive the message. You will get a bounce back message, but it may go in your spam folder. You may also receive bounce back messages from people who have their email forwarding and that forwarding fails. Generally there is nothing that can be done to fix this. Depending on your situation you can ignore it or reach out to that person and tell them their email isn't working.
- You are now done. The draft email you used will likely still be in your email Draft's folder. It can be kept there for future use or you can discard it.

Adding images to the email (advanced).
- Copying images into the email will look ok initially, but when sent the images will not work.
- One solution is to post the image you want to include in the email on the UC website and embed it with HTML code.
- The code is <img src="http://www.utica.edu/...myimage.jpg"> . This would be put in wherever you want the image to appear in the code. Add <br> after the image if you want the following text to be on a different line.
- This video explains how to add this code to your email, it has only been tested in Chrome: https://www.youtube.com/watch?v=MsMSqhMlfao